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ABSTRACT

These proceedings summarize the content and activities of a conference attended by continuing education deans and directors in Ohio's public and private 2- and 4-year institutions of higher education, administrators of nursing homes, and community mental health personnel. Focus is on the major goal of the conference: To examine, with respect to both rationale and means, the extension of educational opportunities to those elderly who congregate in the community, e.g., in recreational centers, retirement housing, and nursing homes. Major sections include a review of conference philosophy, a review of the literature on the conference theme, synopsis of conference proceedings, recommendations and feedback, and a four-page bibliography. An appendix presents guidelines on program planning and proposal writing. (NL)

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CONTINUING EDUCATION FOR THE ELDERLY:

A Report

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Ohio Dominican College
December, 1976

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In Memoriam

Sue Ann Miller was secretary in the Continuing Education Division until her untimely death in March, 1976. She worked without complaint at typing (and re-typing) mailing lists, drafts of proposals, and other miscellanea. We miss her and wish she could have typed the final copy of this project that she helped us start.

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INTRODUCTION

Ohio Dominican College

Ohio Dominican College was chartered in 1911 as the College of St. Mary of the Springs. The name was changed to Ohio Dominican College in 1968.

The College is accredited by the North Central Association of Colleges and Secondary Schools, the State of Ohio Department of Education, and the Ohio College Association.

There are approximately 1000 undergraduate students enrolled in degree and continuing education programs. The college also provides non-credit courses, special workshops and seminars, extension classes, and televised courses through the division of continuing education.

Through the division of continuing education, the college has been involved in several community programs. These include educational programs in the areas of adult basic education, oral history, alcoholism, services for the elderly, and the humanities.

Funding

The funds for the CEDEE project were provided by the Ohio Board of Regents under a grant through Title I of the Higher Education Act of 1965. These funds are for programs which provide community service education designed to 1) reduce barriers to higher education, 2) improve public service delivery capabilities of government, and 3) to serve disadvantaged adults.

CEDEE: A Philosophy

Increasing numbers of elderly persons in Ohio necessitate re-examination and redefinition of the values inherent in service to these persons. The Division of Continuing Education at Ohio Dominican College, under a grant from the Ohio Board of Regents, sponsored a conference on August 19-20, 1976, entitled CEDEE: Continuing Education Delivering Education to the Elderly.

The major goal of the conference was to examine, with respect to both rationale and means, the extension of educational opportunities to those elderly who congregate in the community, e.g. in recreational centers, retirement housing, and nursing homes.

In May, 1976, the Ohio legislature passed an act which reads, in part:

> Each state University or College shall permit any person who is sixty years of age or older and who has resided in the state for at least one year to attend its courses and classes without charging such a person tuition or matriculation fee, provided such attendance is on a noncredit basis, is in courses where classroom space is available, and is approved by the instructors of the courses involved.

While this legislation is certainly a major step in helping elderly persons to develop and maintain skills for independent living, the restrictions stated in it are likely to preclude the possibility that large numbers of elderly will flock to campuses of state institutions of higher education.

Further, since the average educational attainment of Ohioans over age 65 is only 8.7 (Ohio's Older People, 1970 census),

the conference planners thought that providing educational opportunities at levels other than higher educaion would not only provide independent living skills but also serve senior citizens as motivation and a bridge to college and university offerings.

David L. Boggs and William D. Dowling, professors of adult education at the Ohio State University-Columbus, conducted a study in April, 1976, to determine the following: (a) the level of educational activities for the elderly and those who work with the elderly in institutions of higher education in Ohio; (b) the levels of responsibility for such activities within higher education institutions in Ohio; (c) the level of knowledge about aging and factors related to providing services for the elderly amoung continuing education administrators in Ohio; and (d) the level of interest on the part of higher and continuing education in Ohio providing services for these clientele groups:

Some of the questions which were anwsered in the study are:

1. What activities are currently provided by Ohio higher education for (a) the elderly population and (b) those who work with them?
2. What is the level of knowledge on the part of administrators of continuing education concerning (a) the process of aging and (b) factors concerning the provisions of services to the elderly and those who work with them?
3. What is the level of interest in the part of higher education in providing programs in the future for

(a) the elderly and (b) those who work with them?

The data revealed that:

1. Very little educational programming is being conducted at Ohio institutions of higher education for the elderly or those who work with them.
2. The level of knowledge in the area of gerontology possessed by the respondents who would have responsibility for programming in the area is lower than might be desired. It is hoped that continuing education can be provided for them and that they will avail themselves of it.
3. Levels of interest on the part of faculty and administrators for providing educational programs for the elderly and those who work with them are generally perceived to be low by the respondents. Any such educational program to be offered would most likely be a result of cooperative efforts of the academic areas of behavorial and social sciences and the division of continuing education.

The underlying philosophy of OEDEE orginally was that, since adult education is the responsibility of continuing education, deans and directors in Ohio's public and private two-and four-year institutions of higher education would be regarded as decision makers who can improve educational opportunities for older adults. However, as the project staff got involved in conference planning, it became apparent that other service providers are also interested in developing types of continuing education for the elderly they serve. Consequently, administrators of nursing homes and community mental health personnel were also invited to the conference.

REVIEW OF RELATED LITERATURE

The Text

Community Colleges Respond to Elders (1975) was chosen as the text/reference resource for the conference. While the title may make the book seem helpful only to junior and community college administrators, it's subtitle, "A Sourcebook for Program Development," more truly reflects its value as a reference for anyone interested in providing education for elders.

The authors of the text state in the foreword that--

> One of the purposes of education is to provide all individuals with the capacity to participate actively in a constantly changing society. However, current education programs generally are not designed for the particular needs and interests of older adults or recent retirees, 55 and older, who make up a sizeable and currently increasing segment of our population. There is a growing awareness amoung educators of the deficiency. (p iii)

Other Sources

Several persons have attempted to help this growth of awareness. The Academy for Educational Development (1974) conducted a special study for the Edna McConnell Clark Foundation which showed that in 1974 very few colleges and universities served older people with the particular education and related services they needed. The study also revealed that---

> Older individuals represent at least as wide a variety of backgrounds, outlooks, and lifestyles as any other age group. Nevertheless, they are often sterotyped as narrowminded, unteachable, played out. And they are increasingly isolated

> from the main currents of our society by early retirement, by the dissolution of the multi-generational family, and by general neglect on the part of social agencies.
>
> Older Americans require a broad range of educational services to adjust to changing life situations, to find new outlets for skills and interests, to take part in activities where they feel wanted and needed, and to fulfill their desires to be of service. But few older people now seek formal education and even fewer attend colleges for such education. Nor do many of these institutions make any special effort to attract them (pp v, vi).

The Academy's publication, Never Too Old To Learn, recommends 3 broad types of action in programming for the older person:

1. In-depth evaluation of selected existing programs.

2. Creation of more, comprehensive new careers programs for middle- and higher-income elderly and rehabilitation programs to focus on low-income, low-skill elderly.

3. Wider dissemination of the experience gained in existing programs, in the form of conferences, pamphlets, books and guides (p viii).

Gordon (1972) decries the lack of correlation between the amount of time and effort put into prolonging human life and the failure to build in reasons for appreciating those additional years. She urges aging persons to look about themselves and their environments to re-examine and redefine values called for in the process of aging. Designing education for older adults requires vigor of mind in planning a program with reasonable prospects of success. She reports on selected studies of learning and aging and gives their implications for the teaching-learning process. She offers principles inherent in current trends of training programs for aging adults

Grabowski and Mason (1974) have compiled a group of reading reflecting current practices in the field of education which are aimed at the practitioner of education for older adults. It would be impossible here to review all the readings in this publication. Rather, the table of contents is provided so that the reader can determine the practicality and applicability of the readings.

PART I

THE OLDER ADULT AS LEARNER

THE OLDER INDIVIDUAL AS A LEARNER
David L. Arenberg and Elizabeth A. Robertson

PART II

THE ROLE OF EDUCATION IN AN AGING SOCIETY

THE ROLE OF GERONTOLOGY IN ADULT EDUCATION
David A. Peterson

POLITICAL IMPLICATIONS OF EDUCATION FOR AGING
Wilbur J. Cohen

PART III

THE AGING INDIVIDUAL AND THE CHANGING NATURE OF SOCIETY AND EDUCATION

EDUCATIONAL OPPORTUNITIES FOR THE ELDERLY
Michael G. Kobasky

EDUCATION FOR AGING IN THE ELEMENTARY AND SECONDARY SCHOOL SYSTEM
H. Lee Jacobs

PART IV

INFORMAL APPROACHES IN EDUCATION FOR AGING

COMMUNITY PROGRAMS IN EDUCATION FOR AGING
W. Dean Mason

NON-TRADITIONAL EDUCATION: SOME NEW APPROACHES TO A DYNAMIC CULTURE
Earl Kauffman and Patrick Luby

THE CHALLANGE OF LEISURE IN LATER MATURITY
Janet R. MacLean

PART V

PREPARATION FOR CRITICAL PHASES OF LIFE IN AGING

THE ROLE OF COMMUNITY HEALTH SERVICES IN EDUCATION FOR AGING
Muriel Bliss Wilbur

EDUCATION FOR PHYSICAL FITNESS IN THE LATER YEARS
Herbert A. DeVries

NUTRITION EDUCATION IN RELATION TO AGING
Sandra C. Howell

EDUCATION OF THE PROFESSIONAL LONG TERM HEALTH CARE ADMINISTRATOR
Eugene E. Tillock

PART VI

GOVERNMENTAL RESOURCES IN EDUCATION FOR AGING

STATE DEPARTMENTS OF EDUCATION AND STATE OFFICES FOR AGING AS RESOURCES IN RELATIONSHIP TO EDUCATION FOR AGING
Henrietta F. Rabe

PART VII

CONCLUSION

EDUCATION FOR AGING: THE SCOPE OF THE FIELD AND PERSPECTIVES FOR THE FUTURE
Howard Y. McClusky

Sheppard and Valla (1974) studied the status of program offerings for the aging in selected institutions of higher education to ascertain if any programs designed to train personnel to work with the aging are currently being offered, to determine what plans for future programs were being made by institutions of higher education in the Commonwealth of Virginia, and to determine what are the existing attitudes and priorities of those institutions with regard to such programs.

They found that, for the most part, little is taking place, either in the way of currently offered programs or plans for future offerings. However, where programs were being offered or services rendered, or where attitudes were reported tending toward the extension of education of the elderly to a larger segment of the aging population, it appeared that community colleges were more aware of needs and more willing to bear a share of responsibility for meeting those needs than were the four-year colleges and universities.

Kauffman (1969) believes that problems of involving older adults in experiences which achieve and maintain a high level of morale require two presumptions: 1) a culture in which older adults are given high status; and 2) practitioners knowledgeable in functioning within contemporary social restraints while they effect changes in value systems and operational procedures.

A grant from the Administration on Aging in 1974 enabled Roger DeCrow to survey education for the elderly and to write New Learning for Older Adults: An Overview of National Effort. The Adult Education Association of the U.S.A. published this book in which DeCrow discusses many interesting concepts. One is the coinage of the term, "opsimathy," meaning "learning in the later years." Another is the notion of "geriagogy," a take-off on Knowles' idea of andragogy. DeCrow questions whether the difference between pedagogy (the teaching of children), and andragogy (allowing adults to learn), can be extended to a popular European concept of "geriagogy."

Inherent in this concept is the idea that there are similar fundamental differences related to older adult learners. He concludes that any intrinsic differences from "young" to "old" adults matter little in the learning process, so that "most older adults can learn what they need and desire to learn (p 57)."

DeCrow also surveyed 3500 programs to determine such factors as what older adults are learning, who provide the learning opportunities, and what is needed to develop more of the latter.

The bibliography included in this report was gleaned from several sources and cites several other sources in the literature which provide rationale and means of meeting the educational needs of older adults.

North Hennepin Community College in Brooklyn Park, Minnesota (a suburb if Minneapolis), provides an excellent illustration of a successful educational program for older Americans. Here is a checklist of some of the things North Hennepin did along the way to design a program that draws approximately 500 older students (50 years of age or over) per quarter to a wide variety of courses:

Surveyed local needs.

Established liaison with local governmental agencies to make use of municipal facilities (swimming pool).

After an uncertain start, learned the importance of involving an advisory committee in planning, which in turn became an active curriculm committee.

Empolyed are imaginative idea for community involvement-the annual "Campus Invasion" which brings older people to the college and gives them a sense of controlling their own program.

Promoted an effective public information program, resulting in national publicity and hundreds of inquiries.

Printed a good pamphlet mailer to recruit students.

Elicited local economic assistance, such as a free bus donated to transport older students to classes.

Instituted a preretirement program as well as both nondegree and degree offerings.

Integrated older and younger students through rap sessions. (Older people were also elected to the student senate).

Convinced a skeptical faculty of the worth of the program.

Conducted continuous curriculm review to match offerings with demand.

Tapped federal and state funding opportunities.

Peterson (1976) describes the interface between adult education and social gerontology which developed into educational gerontology. He states that programs for elders have continued to expand since Donahue's pioneer book, Education for Later Maturity (1955). However, education for older adults has largely been based on perceived needs rather than on a comprehensive philosophy designed to facilitate lifelong growth experiences.

Ehrlich and Ehrlich (1976) propose a four-part framework for institutions of higher learning involved in gerontology. Two of the four parts are concerned with educating older adults: 1) broaden living options in late life -- new careers and lifetime training; 2) education about the life cycle and the meaning of aging at all levels of the educational system. Because the education of older persons affects their societal status, the authors urge the further opening of university doors to them.

Finally, the reader should be aware of a new movement toward educational gerontology. A quarterly journal entitled Educational Gerontology not only publishes useful information for practitioners in this field, but keeps them apprised of the activities of the new Association for Educational Gerontology. Inquiries concerning the association and the journal should be addressed to:

D. Barry Lumsden
Virginia Commonwealth University
910 E. Franklin Street
Richmond, Va. 23284

SYNOPSIS OF CONFERENCE PROCEEDINGS

Ruth Glick; Ph.D; faculty, Case Western Reserve University; director, Institute for Retirement Studies; member, statewide network of educational consultants, OCoC; consultant, Mayor's Commission on Aging, Cleveland; consultant, Regional Transit Authority on transportation for the elderly; licensed psychologist, Ohio.

Dr. Glick emphasized higher education for older adults. She made the following recommendations and comments:

> Studies show that general intellectual decline as a function of normal aging is pretty much a myth. Given good health, intellectual stability, on the basis of their demonstrated vigor, competencies and independence, the elderly refuse to be relegated to a park bench.
>
> At the same time, however, it seems probable that mandatory retirement will continue relentlessly and at lower and lower ages, even though it may not be wholly desirable or wanted. These conditions have created new problems for persons moving into the later years of life. If large numbers of people are being retired, whether by choice or not, and if people are living longer, are better educated, healthier, more independent, and less resigned to falling out than their parents were apt to be, the question is what they can do with the stretch of life that lies ahead.
>
> One new and striking solution is the return to formal education--to the university, hitherto

considered the exclusive domain of the young. Residents of Cleveland can take pride in the fact that at Case Western Reserve University an academic program for persons age 50 and over has been in operation since February 1972. It is the Institute for Retirement Studies, a pioneer in the movement to extend higher education to people of all ages. This program was designed for men and women who, on retirement, were looking for a new set of purposes. (from brochure of the Institute for Retirement Studies).

Treat older people as mature adults and not merely as "elderly".

Tags placed upon people are bad. Age is not a criterion for anything.

Personal enrichment is a byproduct of fulfillment.

Education can become fuctional for older persons.

Education from the literacy level up is a crying need of older people.

It isn't how well people learn alone, but whether or not they find it rewarding.

Where will we be X years from now when our "elderly" are illiterate, not because they didn't go to college, but because they weren't taught anything there, and when they spent most of their leisure in front of TV or reading popular magazines?

There is a challenge to colleges to adapt structures to incorporate older people.

Colleges have no need to offer junk.

The more education you have when younger, the more you will value it when you get older.

Audit courses are good used as orientation to higher education.

Most ventures (including education) do require stress.

Jill Russell, B.Sc. in Educational Development; Ph.D student Ohio State University; developmental research specialist, OCoA; former coordinator, Information and Referral, OCoA; developer, simulation materials for those who work with the elderly; developer, OCoA data bank.

Mrs. Russell revealed that in 1976, $250,000 was awarded for Title IV-A, the purpose of which is training those who work with the elderly. She believes that there is a great need for retirement education, especially in a man-wife relationship. AARP is excellent resource for education, especially the Institute of Lifetime Learning. Course titles are captioned to attract retirees, don't necessively reflect course content. One possibility is to use college students to teach courses in retirement housing or community centers. Keep tuition low. All funding ends, so ways must be devekoped to build subsequent capital into funded programs. Mrs. Russell handed out several papers and pamphlets on OCoA and older Americans, as well as guidelines for writing proposals. She discussed funding sources with the participants.

Tom Hickey, D.Ph.; faculty, The Pennsylvania State University; associate chairman of Gerontology Center; Pennsylvania State University College of Human Development; recipient, numerous grants and awards for gerontology programs; coordinator, multigenerational Summer Series in Gerontology; president, Association for Gerontology in Higher Education; author and co-author numerous journal articles and professional papers.

Dr. Hickey estimates that 53% of college students are over 25 years old. He believes that, if older persons' educational and career goals are not being met, education needs to be made more relevant and responsive to those goals. He called for "Sunset Street" parelleling Sesame Street, saying that attitudes toward aging play a big part in program development for older people. Designers of continuing education programs should keep in mind that older adults don't like the bureaucratic process--registration lines, filling out forms, and being shuffled around.

Dr. Hickey summarized his remarks with the idea that "education maximizes independence."

William D. Dowling, Ph.D.; faculty, The Ohio State University; former associate director, University of Wisconsin Extension Division; director, former Ohio State University Center for Adult Education; author and co-author, numerous publications on ABE, adult education participants, needs assessment and program development.

Dr. Dowling's introductory remarks included the idea that an increase in the level of education in society is coupled with the fact that more non-work time is available. The mastering of one's own life is the secret of longevity. Education shouldn't be channelled exclusively to one age market or another. Some institutions may leap to serve the 65+ but forget the 25 - 65 year-olds. He questioned if institutions are ready to change in order to meet needs of elderly.

Dr. Dowling then distributed the following outline for "Planning Programs of Interest to the Elderly and Those Who Work With Them." Each of six small groups took one of the outline headings and developed them resulting in the following program guidelines:

Planning Programs of Interest to the Elderly
and Those Who Work With Them

1. Determining organizational capability

   1) Consistency with capabilities and missions of institutions

   2) Ability to adapt or change existing procedures to accommodate the older students

   3) Cost analysis and feasibility of program

   4) Physical needs analysis

2. Determining learning needs of individuals and groups

   1) People should be consulted
      A) Grass-roots
      B) Go to where groups meet
         1) Senior Centers
         2) Churches
         3) Those already enrolled in classes
         4) Housing

      C) Personal approach -- know interest of those already involved in education

      D) Those who have contact with or work with older persons

      E) Advisory committees

3. Planning Learning Enterprises With The Learners

   1) Develop advisory group with representation from senior organizations and interested senior members from the community

   2) Seek input from organizations on aging

   3) Involve members of Advisory Group by employing them in program

      In the process areas such as teaching, counseling, and consulting recognize their particular skills and expertise.

4. Establishing Objectives For The Learning Enterprise

Determine wants and needs of institution and participants.

Make objectives: measurable
relevant to needs assessment
realistic - accomplishable

Incorporation of needs for elders into institutional overall planning

5. Designing A Program Plan

1) Must do 1-4 before #5.

2) (A) Are you setting up realistic course expectations?
(B) Check out with older adults (potential program participants)

3) Accomplish task within time frame.

4) Write an accurate course description.

5) #4 to be used in promotional purposes.

6) Consider: time, year, day, physical location, transportation, tuition, payment plans.

7) Older adults to participate in 1-6 including design, implementation and evaluation and advisory committee.

8) Be careful with sequence of courses.

9) Review outcomes and designs of previous programs.

10) Follow up on program drop-outs.

11) Simplify registration and parking.

12) Access to advisor is imperative.

6. Evaluating Educational Outcomes

1) Course survey forms, either signed or anonymous

2) Verbal Critique ... by panel or committee

3) Personal follow up ... phone or visit

4) Post-program performance evaluation

5) Keep a sensitive, community ear

PANEL

Moderator: Joanne Byrne, M.S. Guidance and Counseling
--program coordinator, COAAoA
--former senior center director, Cincinnati

Panel Members: Jessie Barlett, Vice-Chairman, OCoA

Laura Clark, retired from nursing faculty, OSU

Russell Compton, Senior Citizens Placement Bureau

Edgar House, retired educator

The panel of retired and semi-retired persons was selected to lend credence to the conference. Participants considered this to be a most significant way of further presenting information on program content.

The panel members stated some reasons for Adult Studies:

1. Self-improvement
2. More participation in religious services
3. Communication with educated children
4. Self-confidence

They suggested that we treat older people with respect and dignity. Discuss what the needs of the older people are and respond to that need. Do not impose one program on older Americans but find out what they want.

CONFERENCE FEEDBACK

Existing Programs

Dick Starr from Clark Technical College in Springfield shared ideas that have been employed by his division of continuing education. A Mature Citizens Program is being enhanced by a grant from OCoA under Title IV-A. The grant will pay a retired person to: 1) coordinate course information for older students; 2) recruit older students to on-campus courses; 3) help develop off-campus courses at sites where older persons congregate. The main goal of the program is to help reduce access barriers to education for older persons on the largely rural area served by Clark Tech.

Patricia Herban of Ohio State Division of Continuing Education related activities of that division which contribute to promoting educational opportunities for older persons. She also urged strongly that area colleges develop a structure for an ongoing dialogue regarding continuing education for the elderly. Such a structure might provide a means for exchanging information about program development and course titles, both successful and unsuccessful. Reasons why a particular course was popular or not would be helpful.

At Ohio State, reduced fees may be possible for husband and wife registering for the same course in continuing education. If enrollment in a course reaches a "break-even" point, senior adults (age 60 and over) may register for the course for half fee. Some courses offered in Autumn, 1976, were "Understanding

Human Aging," "Moral Issues in Biology and Medicine," "Relaxation, Communication and Self-Awareness," and "Understanding Loneliness."

Iris Whittington-Gold described activities at Cuyahoga Community College-East Campus. They have successfully conducted classes at retirement housing and neighborhood centers to facilitate the extension concept.

Phyllis Morris gave a concrete example of an actual course which she developed and presented at Nazareth Towers, a non-sectarian retirement high rise administered by the Dominican Sisters of St. Mary of the Springs.

The Bible and Prayer

A. The purpose of the program is to:

1. Provide opportunities to an ecumenical group to involve themselves in ways that are meaningful and self-enhancing thereby minimizing the problems of isolation and loneliness.

2. Help the participants to understand better the role of prayer in their lives and how to use scripture as an aid to prayer.

3. Help the participants find meaning in their lives by both sharing prayer with others and by becoming familiar with Bible reading.

B. The general topics for these sessions are:

1. Session One: Purpose of the program
Introduce the Land of the Bible with a filmstrip:
The Land of Israel Kit
Lesson 5 - Geography

Passages for prayer: Ps 23; Lk: 27-28

2. Session Two: Introduce the Theme of the Desert in the Old Testament

Filmstrip: Deserts of Biblical Isreal

Passages: Ps 107: 4-9; Ps 62

3. Session Three: What is Prayer? The Forms of Prayer.

Paulist Press Family Program: Cycle B
Praise and Gratitude (Prayer)

Discussion on What is Prayer and How it Affects One's Life

Publicity

Was done by the Director of Nazareth Towers, Sr. Maris Stella, for the residents

Participation

The number of participants doubled in the three weeks (from 15-30)

For further information about this program contact:

Miss Phyllis J. Morris
Department of Religious Education
197 E. Gay Street
Columbus, Ohio 43219

Several other participants exchanged ideas about program development. Some questions raised were:

Can we exchange brochures with each other that tell about new programs?

Could we have had more formal discussion of actual programs?

For information on the Institute of Lifetime Learning contact:

Mr. Martin Kohn
Department of Special Program
University of Akron
Akron, Ohio 44325

Funding

Funding was dealt with in two aspects of the conference. Appendix 1, "Program Planning and Proposal Writing," was included in the packet which each participant received, and was discussed at length, with participants sharing ideas about it.

Discussion of funding sources resulted in the following possible sources of seed money &/or grants and awards.

Government

*Federal:

Administration on Aging (AoA)
Dept. of Health Education & Welfare
330 C. Street S.W.
Washington, D.C. 20201

National Institute of Child Health and Human Development (NICHD)

National Institute of Mental Health (NIMH)

Office of Education (USOE)
400 Maryland Avenue S.W.
Washington, D.C. 20201

Department of Labor (DOL)
601 D. Street N.W.
Washington, D.C. 20201

State:

Ohio Commission on Aging
State Library
ACTION Office
Department of Health
Department of Education, Division of Federal Assistance

*Information on available monies can be found in the following publications:

Federal Register
Catalog of Federal Domestic Assistance
American Council on Education Bulletin

Local:

Community Mental Health Agency
Community Action Agency
Mayor's Office
Department of Parks and Recreation
Board of Education

Other Sources:

United Way Agencies
Unions
Business and Industry

Gerontological Society
One Dupont Circle
Washington, D.C. 20036

National Retired Teachers Association
701 N. Montgomery Street
Ojai, California 93023

American Psychological Association
1200 17th Street N.W.
Washington, D.C. 20036

National Council On Aging
1828 L Street, N.W.
Washington, D.C. 20036

American Association of Community and
Junior Colleges
One Dupont Circle
Washington, D.C. 20036

Association for Gerontology
in Higher Education

National Endowment for the Humanities

National Council of Senior Citizens
1511 K Street N.W.
Washington, D.C. 20049

American Association of Retired Persons (AARP)
1909 K Street N.W.
Washington, D.C. 20049

American Society for Training
and Development (ASTD)

National Association of Federal Retired Employees
1533 New Hampshire Avenue N.W.
Washington, D.C. 20036

University and cooperation extension divisions are additional sources of free help. They often have resources for program development, lecturers, audio-visual aids, and library resources.

There are numerous agencies and organizations that can provide help in various ways. For example, the National Association of Manfacturers* Women's Division prepares kits that can be used to teach home safety, consumerism, and other topics that might be of concern to older adults. Church groups, charitable organizations, and other private organizations also have resources waiting to be tapped. Each county in Ohio has an Information and Referral (I and R) office which has a list of resources available from the Ohio Commission on Aging.

Private Foundations

Any foundations (in or out of Ohio) must report to the state's Attorney General's office, which compiles a directory of said foundations. Each directory listing specifies the name and address of the foundation; the purpose(s) for which their monies are allocated; their total assets; and previous amounts awarded.

Foundations are not a source to ignore for innovative programs. Never Too Old To Learn, a study of the Academy for Educational Development was funded by the Edna McConnell Clark Foundation. The Russell Sage Foundation provided the support for three volumes of research, Riley and Foner's Aging and

*National Association of Manfacturers, 1776 F Street, Washington, D.C.

Society. Ohio Dominican College received a grant from the George Gund Foundation in Cleveland to produce "Life in America: 1900-1950," an oral history program. Elderly citizens of Columbus, Ohio, talked about living in early twentieth-century America. Their discussions, recorded on slides and audio tape, have been made into a thirty-three minute presentation available from the Ohio Historical Society or Ohio Dominican College.

Other Resources

In addition to allocating grants under the Older American Act, The Ohio Commission on Aging* provided technical assistance to organizations interested in expanding or creating services to the elderly. The Planning Evaluation, Research, and Training (PERT) section can be of great value in helping program development. Included in this section is the commission library which provides literature, films, and other resources free of charge to persons in Ohio.

The state is divided into fourteen geographic areas: The area agencies and their addresses are listed below:

Council on Aging of the Greater
Cincinnati Area
614 Provident Building
Seventh and Vine
Concinnait, Ohio 45202
513/721-1025

Miami Valley Council on Aging
184 Salem Avenue
Dayton, Ohio 45406
513/225-3046

*The Ohio Commission on Aging
50 West Broad Street, 9th Floor
Columbus, Ohio 43215

PSA Three Agency on Aging
205 West Market Street
Lima, Ohio 45801
419/229-4234

Area Four Agency on Aging
One Strashan Square
Toledo, Ohio 43604
419/248-4234

District Five Area Agency on Aging
50 Blymer Avenue
Mansfield, Ohio 44903
419/524-4178

Central Ohio Area Agency on Aging
272 S. Gift Street
Columbus, Ohio 43215
614/461-6650

District Seven Agency on Aging
Rio Grande College
Rio Grande, Ohio 45674
614/ 245-5353 Ext. 26

Buckeye Hills-Hocking Valley
Regional Development District
216 Putnam Street, Suite 410
Marietta, Ohio 45750
614/374-9436

Area Nine Agency on Aging
630 Main Street
Bridgeport, Ohio 43912
614/635-1346

Mayor's Commission on Aging
City Hall
Cleveland, Ohio 44114
216/694-2833

Cuyahoga County Office on Aging
1276 West Third Street
Cleveland, Ohio 44113
216/241-2700 Ext. 554

Area Office on Aging
P.O. Box 3377
Akron, Ohio 44307
216/376-9172

Stark-Wayne Area Agency on Aging
218 Cleveland Avenue, S.W.
Canton, Ohio 44702
216/455-8951

District 11 Area Agency on Aging
976 West Federal Street
Youngstown, Ohio 44510
216/746-2935

RECOMMENDATIONS

1) Share information regarding past programs - successful or not - as well as information about current programming.

2) There is an apparent need for compilation of a list of funding sources for programs designed to benefit the elderly and those who serve them.

3) Provide program planners with grantmanship skills.

4) Convene a body of persons in Ohio interested in continuing education for the elderly which would meet on a regular basis to exchange ideas.

5) Let's learn about needs assessment and program development.

6) Involve elderly in planning.

7) Don't sterotype elderly - they are adults.

8) Literacy is a crying need of many older people; recognize this and plan to meet it.

9) Adapt college structure to incorporate older people, broaden program content to include content for 3 types of learners (per Houle).

--activities oriented
--learner oriented
--goal-oriented

Finally, the ideas of planning innovative and unique programs, and of daring to be different, were summarized by a reading of the following newspaper clipping:

DEAR ANN LANDERS: The following was written by Nadine Stair of Louisville, Kentucky. She is 85 years old and I believe she has a real message here. --- LONG TIME FAN

DEAR FAN: I agree. Here it is with my warm thanks:

IF I HAD MY LIFE TO LIVE OVER

I'd dare to make more mistakes next time. I'd relax. I would limber up. I would be sillier than I have been this trip. I would take more chances. I would take more trips, I would climb more mountains and swim more rivers. I would eat more ice cream and less beans. I would perhaps have more actual troubles, but I'd have fewer imaginary ones.

You see, I'm one of those people who live sensibly and sanely hour after hour, day after day. Oh, I've had my moments and if I had it to do over again, I'd have more of them. In fact, I'd try to have nothing else. Just moments, one after another, instead of living so many years ahead of each day. I've been one of those persons who never goes anywhere without a thermometer, a hot water bottle, a raincoat, and a parachute. If I had to do it again, I would travel lighter than I have.

If I had my life to live over, I would start barefoot earlier in the spring and stay that way later in the fall. I would go to more dances. I would ride more merry-go-rounds. I would pick more daisies.-- FROM ASSOCIATION FOR HUMANISTIC PSYCHOLOGY NEWSLETTER, JULY 1975.

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APPENDIX

PROGRAM PLANNING AND PROPOSAL WRITING

Proposal Summary

The Summary is a very important part of a proposal--not just something you jot down as an afterthought. There may be a box for a summary on the first page of a federal grant application form. In writing to a foundation, the summary may be presented as a cover letter, or the first paragraph of a letter-type proposal. The summary should be clear, concise and specific. It should describe who you are, the scope of your project, and the projected cost.

Some funding sources may screen proposals as a first step in grant-making. This is, they briefly examine each proposal to see if it is consistent with their priorities, if it is from an agency eligible to apply for their funds, etc. As a further step, the "screeners" may draw up a summary of their own and these proposals summaries may be all that are reviewed in the next step of the process. It is much better to spend the time to draw up a summary of your own that the funding source can use, than to hope that the reviewer sees the importance of your program in a brief initial look at your proposal.

I. Introduction

This is the section of a proposal where you tell who you are. Many proposals tell little or nothing about the applicant organization and speak only about the project or program to be conducted. Proposals are often funded on the basis of the reputation or "connections" of the applicant organization or its key personnel rather than on the basis of the program's content alone. The Introduction is the section in which you build your credibility as an organization which should be supported.

Credibility

What gives an organization credibility in the eyes of a funding source? A traditional, rather conservative funding source will be responsive to persons of prominence on your Board of Directors, how long you have been in existence, how many other funding sources have been supporting you, and other similar characteristics of your organization. An

"avant garde" funding source might be more interested in a Board of "community persons" rather than of prominent citizens and in organizations that are new, rather than established.

Potential funding sources should be selected because of their possible interest in your type of organization or your type of program. You can use the introduction to reinforce the connection you see between your interests and those of the funding source.

What are some of the things you can say about your organization in an introductory section?

-- How you got started.
-- How long you have been around.
-- Anything unique about the way you got started, or the fact that you were the first thus-and-so organization in the country, etc.

-- Some of your most significan accomplishments as an organization, or, if you are a new organization, some of the significant accomplishments of your Board or staff in their previous roles.
-- Your organizational goals--why you were started.
-- What support you have received from other organizations and prominent individuals (accompanied by some letters of endorsement which can be in an appendix).

We strongly suggest that you start a "credibility file" which you can use as a basis for the introductory section of future proposals you write. In this file you can keep copies of newspaper articles about your organization, letters of support you receive from other agencies and from your clients. Include statements made by key figures in your field or in the political arena that endorse your kind of program even if they do not mention your agency.

For example, by including a presidential commission's statement that the type of program which you are proposing has the most potential of solving the problems with which you deal, you can borrow credibility from those who made the statement.

The credibility you establish in your introduction may be more important than the rest of your proposal. Build it! But here, as in all of your proposal, be as brief and specific as you can.

II. Problem Statement or Assessment of Need

The introduction indicates your areas of interest--the field in which you are working. Now you will zero in on the specific problem or problems that you want to solve through the program you are proposing.

Pitfalls

There are some common pitfalls into which agencies fall when they try to define problems.

Sometimes an organization will paint a broad picture of all the ills plaguing people in a part of the community. Proposals writers may try to draw a picture of a needy community in all its dimensions in order to convince the funding source that there are really problems there. Don't overkill, or the funding agency may wonder how you can possibly deal with all of these problems with the stated time and budget constraints.

Narrow down your definitions of the problem you want to deal with to something you can hope to accomplish within a reasonable amount of time and with reasonable additional resources.

Document the Problem

Document the problem. How do you know that a problem really exists? Don't just assume that "everybody knows this is a problem"... That may be true, but it doesn't give a funding source any assurance about your capabilities if you fail to demonstrate your knowledge of the problem. Don't fill your proposal with tables, charts and graphs. If you must use extensive statistics, save them for an appendix, but pull out the key figures for your problem statement. And know what the statistics say.

To summarize:

1) make a logical connection between your organization's background and the problems and needs with which you propose to work.
2) support the existence of the problem by evidence. Statistics, as mentioned above, are but one type of support. You may also get advice from groups in your community concerned about the problem, from prospective clients, and from other organizations working in your community and professionals in the field.
3) define clearly the problems with which you intend to work. Make sure that what you want to do is workable--that it can be done by you within a reasonable time, and with a reasonable amount of money.

III. Program Objectives

One of your concerns throughout the proposal should be to develop a logical flow from one section to another. Whereas you can use your introduction to set the context for your problem statement, you can likewise use the problem statement to prepare the funding source for your objectives.

An objective is a specific, measurable outcome for your program.

If you have defined a problem, then your objectives should offer some relief to the problem. If the problem which you identify is a high incidence of drug abuse by youth in your community (substantiated, of course) then an objective of your program should be the reduction of the incidence of drug abuse among youth in your community. If the problem is unemployment, then an objective is the reduction of unemployment.

Distinguish between Methods and Objectives

One common problem in many proposals is a failure to distinguish between means and ends--a failure to distinguish between methods and objectives.

Evaluation clearly relates to the setting of measurable objectives, for a good set of well-drawn and realistic objectives becomes a set of criteria for the evaluation of a program, and thus serves another purpose.

IV. Methods

Describe the methods you will use-- the activities you will conduct to accomplish your objectives.

Research

The informed reviewer wants to know why you have selected these methods. Why do you think they will work? This requires you to know a good deal about other programs of a similar nature. Who is working on the problem in your community and elsewhere? What methods have been tried in the past, and are being tried now and with what results? In other words, can you substantiate your choice of methods?

The consideration of alternatives is an important aspect of describing your methodology. Showing that you are familiar enough about your field to be aware of different models for solving the problems, and showing your reasons for selecting the model that you have, gives a funding source a feeling of security that you know what you are doing, and adds greatly to your credibility.

One planning technique which you might want to use is this. Take a sheet of paper and divide it into columns. The first column is the "problem" column, the second is headed "objectives," the third "methods" and the fourth is "evaluation." If you list all your objectives separately in the second column, you can then identify the problem that it relates to, the specific methods in your program that deal with the objective, and the criteria of success in reaching the objective as well as the method of evaluation.

This helps you to see whether you are truly dealing with all of the problems you talked about, whether your objectives relate to the problem(s), whether you have a method of reaching each objective, and whether you have set up an evaluation mechanism to deal with your entire program. This leads to the next proposal component--evaluation.

V. Evaluation

Evaluation of your program can serve two purposes for your organization. Your program can be evaluated in order to determine how effective it is in reaching the objectives you have established--in solving the problems you are dealing with. This concept of evaluation is geared towards the results of your program.

Evaluation can also be used as a tool to provide information necessary to make appropriate changes and adjustments in your program as it proceeds.

As we have stated, measurable objectives set the stage for an effective evaluation. If you have difficulty in determining what criteria to use in evaluating your program, your objectives probably aren't very specific.

Subjective and Objective Evaluations

Subjective evaluations of programs are rarely evaluations at all. They may tell you about how people "feel" about a program, but seldom deal with the concrete results of a program. For example, we saw an example of an evaluation of an educational program that surveyed opinions about program success held by students, parents, teachers and administrators of the program. This is a pretty "soft" evaluation, and doesn't really give much evidence to support the tangible results of such a program.

In addition, this particular evaluation solicited comments from students when they completed the program, failing to deal with over 50% of the students who started but did not complete the program. Clearly, those students who finished the program are going to react differently, as a group, from those who didn't complete the program. And we might, as an agency, learn a great deal from those who didn't finish. From the nature of this evaluation, one might suppose that the educational institution involved was committed to producing what they thought would "look like" a good evaluation, but it wouldn't pass muster with a critical reviewer.

Subjectivity--introducing our own biases into an evaluation--will often come in when we

evaluate our own programs, particularly if we feel that continued funding depends on producing what "looks like" a good evaluation.

One way of obtaining a more objective evaluation, and sometimes a more professionally prepared evaluation, is to look to an outside organization to conduct an evaluation for you. You might go to other non-profit agencies, colleges and universities in your community which will work with you in developing an evaluation for your program. Sometimes it is possible to get an outside organization to develop an evaluation design and proposal for evaluation that can be submitted to a funding source, complete with its own budget, along with your proposal. This not only can guarantee a more objective evaluation, but can also add to the credibility of your total application.

It is essential to build your evaluation into your proposal, and to be prepared to implement your evaluation at the same time that you start your program, or before. If you want to determine change along some dimension, then you have got to show where your clients have come from. It is very difficult to start an evaluation at or near the conclusion of a program, for you usually don't know the characteristics of the people you are working with as they existed prior to being in your program.

VI. Budget

As with proposals themselves, funding source requirements for budgets differ, with foundations requiring less extensive budgets than federal agencies. The following budget design will satify most funding sources that allow you to design your own budget and, with minor changes that the sources will tell you about, can be adapted to fit most federal agency requirements. Our recommended budget contains two components--the first is Personnel and the second is Non-Personnel. You can expect that, in most social service and related programs, approximately 80% of the budget will fall into the three components of the Personnel section.

A. Personnel

1. Wages and Salaries: list all full and part-time staff in the proposed program.

The Federal government requires that all of your salaries are comparable to the prevailing practices in similar agencies in your community. To justify the salaries you build into your budget you must obtain information from other local agencies regarding the salaries of persons with job descriptions, qualifications and responsibilities similar to those of the jobs in your agency. You might go to the local city and/or county government, the school district, the United Way or United Fund, etc. By comparing the jobs in your agency with the jobs at other local agencies, you plan a salary for each position, and you keep the "comparability data" on hand, should you be asked by the funding source to justify your staff salaries.

B. Fringe Benefits: list all the fringe benefits your employees will be receiving, and the dollar cost of these benefits. Some fringe benefits are mandatory--but vary from state to state. Mandatory fringe benefits may include State Disability Insurance, Unemployment Compensation, Retirement contributions, etc. Most non-profit agencies participate in the Social Security Program (FICA) although non-profit agencies may vote not to do so. These fringe benefits are all based on a percentage of salaries.

   Some fringe benefits may be paid not on a percentage of salary, but with an absolute dollar amount for each employee.

   If you already operate a variety of programs your answer is simple. Empolyees in a new project receive the same fringe benefits as those you already employ in some other activity. The Federal government requires this parity, and it is a good practice. If you are starting a new agency, or haven't formulated a gringe benefit policy yet, then you go to the same kinds of figures as you did when establishing your salary schedule--you provide in fringe benefits what is comparable to the prevailing practice in similar agencies in your community.

C. Consultants & Contact Services: the third and final part of the Personnel section of your budget. In this section you include paid and unpaid consultants,

volunteers,and services for which you contract. For example, your project may not be large enough to warrant hiring a full-time bookkeeper, and you may want to use a bookkeeping service to keep up your books.

It is important to develop as much donated services and equipment as possible. No funding source likes to feel it is being asked to carry the entire burden of a project. In fact, many funding sources require a certain percentage of matching funds. If the project really means something to you, and to your community, then you should have been able to develop a substantial "matching" contribution in your budget. Other kinds of contract services that might be included would be for auditing, public relations, etc.

In this section you can include all of your volunteer assistance. How do you value a volunteer's time for budgetary purposes? Federal agencies maintain lists of various types of jobs, and assign a value to each hour of volunteer time for each position. For example, the time of a professional Social Worker may be valued at $7.50 per hour.

The figure which you get from a Federal agency volunteer valuation list may be less than the actual current hourly salary of the volunteer. In that case, you may use the actual hourly salary, but be prepared to substantiate that figure. Or, the volunteer may have worked as a paid consultant for $10.00 per hour. You can use that figure if you can document it.

With all of your volunteers, you are required to deliver the promised volunteer services, just as if the funding source was actually paying their salary, and you will be asked to document the work performed by volunteers and keep records of their volunteer time which may be audited in the case of a Federal grant.

D. Non-Personnel

1. Space Costs: list all of the facilities you will be using, both those on which you pay rent and those which are being donated for your use. Rent or the valuation of donated facilities must be comparable to prevailing rents in your geographic area. In addition to the actual rent, you should also include the cost of utilities, maintenance services and renovations, if they are absolutely essential to your program.

2. Rental, Lease or Purchase of Equipment: list all of the equipment, donated or to be purchased, that will be used in the proposed program. This includes office equipment, typewriters, Xerox machines, etc. Let discretion be your guide in this section. Try to obtain as much donated equipment as you can. It not only lowers the cost of the program, but it shows the funding source that other people are involved in trying to make the program happen.

3. Consumable Supplies: list supplies such as paper clips, paper, pens, pencils, etc. If you have any unusual needs for supplies--perhaps you are making a workroom available for community persons-put in a separate figure for that.

4. Travel: divide this section into local and out-of-town travel. Don't put in any big lump sums which will require interpretation or raise a question at the funding source. Remember, on local mileage all of your staff won't be driving on the job, and not all who do will drive the same amount.

5. Telephones: remember installation costs! Put in the number of instruments you will need times the expected monthly cost per instrument. Justify any extensive out-of-town calling that you will have to do.

6. Other Costs

   This catch-all category can include the following:

   a. Postage
   b. Fire, theft and liability insurance
   c. Dues in professional associations paid by the agency
   d. Subscriptions
   e. Publications, the cost of which may be broken up into:
      (1) printing
      (2) typesetting
      (3) addressing, if done by a service
      (4) mailing (separate and distinct from office postage above)
   f. Any other items that don't logically fit elsewhere

A NOTE ABOUT INDIRECT COSTS (OVERHEAD)

Some programs, particularly those conducted within a large institution, such as a college or university,

also include an indirect cost figure. Indirect costs are paid to the host institution in return for their rendering certain services to the project. They may manage the bookkeeping and payroll, assume some responsibility for overseeing the project, or take care of maintenance and utility costs.

VII. Future Funding

This is the last section of your proposal, but by no means the least important. Increasingly, funding sources want to know how you will continue your program when your grant runs out. This is irrelevant for one-time only grant applications, such as requests for vehicles, equipment, etc. But if you are requesting program money, if you are adding to your projects through this proposal, then how will you keep it going next year?

A promise to continue looking for alternate sources of support is not sufficient. You must present a plan that will assure the funding source, to the greatest extent possible, that you will be able to maintain this new program after their grant has been completed. They don't want to adopt you--they don't want you continually on their back for additional funds. Moreover, if you are having problems keeping your current operations supported, you will probably have much more difficulty in maintaining a level of operation which includes additional programs. The funding source may be doing you no favor by supporting a new project, and putting you in a position of having to raise even more money next year than you do now.

What is a good method to guarantee continued support for a project? One good way is to get a local institution or governmental agency to agree to continue to support your program, should it demonstrate the desired results. But get such a commitment in writing. A plan to generate funds through the project itself--such as fees for services that will build up over a year or two, subscriptions to publications, etc., is an excellent plan. The best plan for future funding is the plan that does not require outside grant support.

(Adapted from Kritz, Norton J. "Program Planning and Proposal Writing," The Grantsmanship Center News, Issue No 3. 1015 W. Olympic Blvd., Los Angeles, California 90015.

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